

COMMERCE SMALL PURCHASES SYSTEM (CSPS)  
PROCUREMENT DESK PROCEDURES

## **7. Review Buyer Initial Workload**

- |            |                                     |   |
|------------|-------------------------------------|---|
| <b>7.1</b> | <b>Introduction</b>                 | This procedure describes a buyer's first contact with a requisition that has been assigned to him/her by the expeditor. Requisitions that are assigned to a buyer first appear via the CSPS "The Buyer Initial Workload Management Screen" (PR602). This screen provides the buyer with an initial capability to organize work assignments. It also provides the buyer with the ability to initiate the Request for Quote (RFQ) process based on the requisition. |
| <b>7.2</b> | <b>Who Performs the Procedure</b>   | Each buyer will be responsible for managing and processing their assigned requisitions. Only requisitions assigned to an individual buyer will appear on that buyer's workload screen.  |
| <b>7.3</b> | <b>Initiating the Process</b>       | The process begins when the buyer opens the "Buyer Initial Workload Management Screen" (PR602) and determines that the expeditor has assigned a new requisition to the buyer.   |
| <b>7.4</b> | <b>How to Perform the Procedure</b> | From the Main Menu, select Transaction. From the Transaction menu, select Procurement. From the Procurement menu, select "PR602 - Buyer Initial Workload". Follow the steps below for PR602.  |

COMMERCE SMALL PURCHASES SYSTEM (CSPS)  
PROCUREMENT DESK PROCEDURES

**7.5 Viewing a Requisition from the Workload Screen**

This procedure describes the steps necessary to view a requisition from the Buyer Initial Workload Management Screen.

Note: The Buyer Initial Workload Management Screen provides the buyer with an abstract of each purchase request assigned to the buyer (by line item). The abstract is intended to provide the buyer with summary information (see both the "Go to Page 1" and "Go to Page 2" buttons), the buyer should use the original requisition.

*PR602 Page 1 - Procurement Initial Workload Management Screen*

Buyer Initial Workload Management Screen [PR-602] Page 1

Document Number	Rel No.	Chg No.	Item No.	RFQ Number	Summary Description
1776	0	0	1	RFQAA5719980003178	provide extra high quality materia
1748	0	0	1	RFQAA5719980003118	1
1716	0	1	1	RFQAA5719980003018	1
1716	0	1	2	RFQAA5719980003018	new description
1563	0	0	1	RFQAA5719980003078	klbg
1552	0	1	1	RFQAA5719980002918	test
1284	0	1	1	RFQAA5719980002298	DESCRIPTION
1284	0	1	2	RFQAA5719980002298	DESCRIPTION
1228	0	0	1	RFQAA5719980002118	test
1185	0	1	1	RFQAA5719980001858	1

Buttons: Clear, Apply Changes, Go To Page 2, Full Descr., Assign to RFQ, Assign to PO

COMMERCE SMALL PURCHASES SYSTEM (CSPS)  
PROCUREMENT DESK PROCEDURES

*PR602 Page 2 - Procurement Initial Workload Management Screen*

Buyer Initial Workload Management Screen (PR-602) Page 2

Changed Requisition No. Changed 11

	Office Code	Bureau Code	FY	Quantity Ordered	Deliver To	Deliver Date	Unit Price	Unit Issue
<input checked="" type="checkbox"/>	1985-AA	57	1999	10	C C AMATO	30-NOV-1998	19.00	EA
<input type="checkbox"/>	1985-AA	57	1999	20	C C AMATO	30-NOV-1998	20.00	EA
<input type="checkbox"/>	1985-AA	57	1999	30	C C AMATO	30-NOV-1998	30.00	EA
<input type="checkbox"/>	1985-AA	57	1999	40	C C AMATO	30-NOV-1998	40.00	EA
<input type="checkbox"/>	1985-AA	57	1999	50	C C AMATO	30-NOV-1998	50.00	EA
<input type="checkbox"/>	1985-AA	57	1999	10	C C AMATO	30-NOV-1998	10.00	EA
<input type="checkbox"/>	1985-AA	57	1999	20	C C AMATO	30-NOV-1998	20.00	EA
<input type="checkbox"/>	1985-AA	57	1999	30	C C AMATO	30-NOV-1998	30.00	EA
<input type="checkbox"/>	1985-AA	57	1999	40	C C AMATO	30-NOV-1998	40.00	EA
<input type="checkbox"/>	1985-AA	57	1999	50	C C AMATO	30-NOV-1998	50.00	EA

STEP	ACTION
1.	Click once on any line item to view it. The entire line will turn blue. A double click on the line item, will turn it yellow.

COMMERCE SMALL PURCHASES SYSTEM (CSPS)  
PROCUREMENT DESK PROCEDURES

STEP	ACTION
2.	<p>Click the "FM-030/014" icon in the toolbar (i.e., the "chess piece") to view the requisition in read-only mode. The "Purchase Request Screen" (FM030) will appear and all applicable data will be displayed.</p> <p>Note: If the requisitioner has modified the requisition, the "Purchase Request Change Order Screen" (FM014) will appear instead of the "Purchase Request Screen" (FM030).</p> <p>a. Use the "NEXT" and "PREV" buttons on the "Purchase Request Screen" (FM030) to view the entire requisition. Pay particular attention to comments from the requisitioner in the NOTES field and also to comments from the approvers in the ROUTING field. Double click on the NOTES and/or ROUTING field to view these comments.</p> <p>b. Click the "Print" icon in the toolbar to print the CD-435.</p> <p>Note: In general, buyers will not be able to view a requisition (on-line) once it is either assigned to a purchase order or to an RFQ.</p> <p>c. Click the "EXIT" icon in the toolbar or the "PREVIOUS" button to return to the PR602 screen.</p>

COMMERCE SMALL PURCHASES SYSTEM (CSPS)  
PROCUREMENT DESK PROCEDURES

- 7.6**      **Assigning Requisition line items to an RFQ or to a Purchase Order**      This procedure describes the steps necessary to assign requisition line items either to a Request for Quote or to a Purchase Order.

STEP	ACTION
1.	Double click on any line item from the requisition you wish to assign to an RFQ or to a purchase order. The entire line will turn yellow.
2.	<p>If the buyer chooses to assign, the remaining line items from the requisition (if any exist), then the buyer should either</p> <p>a.      Click on the “ALL” icon in the toolbar (i.e., the “multiple windows” icon) and the system will automatically highlight the remaining line items in yellow, or</p> <p>b.      Double click on each of the remaining line items from the requisition to highlight them in yellow.</p>

COMMERCE SMALL PURCHASES SYSTEM (CSPS)  
PROCUREMENT DESK PROCEDURES

STEP	ACTION	
	IF...	THEN...
<b>3a.</b>	Assigning to a Purchase Order (i.e., not competing the requisition - processed via CSPS' SF-18 Request for Quotation Process - RFQ)...	<p>Click the "Assign to PO" button on the bottom right of the screen. A message confirming the assignment will appear on the screen. Click "OK" to confirm the assignment or click "CANCEL" to cancel the assignment.</p> <p>Note: If the buyer clicks "OK", the highlighted requisition line items will disappear from the screen.</p> <p>Note: Once the requisition has been associated directly with a purchase order, then the requisition can no longer be amended. The buyer should ensure that sufficient funds are available on the requisition to make the award prior to assign the requisition to a purchase order.</p>
<b>3b.</b>	Assigning to a Request for Quote (i.e., competing the requisition - processed via CSPS' SF-18 Request for Quotation Process - RFQ)...)...	<p>Click the "Assign to RFQ" button on the bottom right of the screen. The "Request for Quotation Screen" (PR605) will appear.</p> <p>Note: See procedures "Section 8- Enter and Issue Requests for Quote" for information on completing the PR605 screen.</p>

COMMERCE SMALL PURCHASES SYSTEM (CSPS)  
PROCUREMENT DESK PROCEDURES

**7.7 Applying Requisition Changes Once an RFQ has been Entered**

This procedure describes the steps necessary to address requisition modifications that are made after the buyer creates an RFQ.

Requisitioners are able to amend their requisitions until either: 1) the buyer clicks the “Assign to PO” button on the “Buyer Initial Workload Management Screen” (PR602), or 2) the buyer flags a vendor for award (within the system) following the RFQ process. This procedure addresses various scenarios that can occur if the buyer clicks the “Assign to RFQ” button on PR602 and the requisitioner amends the requisition after the buyer creates the RFQ but before the buyer flags a vendor for award.

STEP	ACTION	
	IF...	THEN...
1.	The requisitioner amends the requisition before the buyer clicks “Assign to PO” or “Assign to RFQ” ...	No action is required.  The system will automatically display the updated requisition when the buyer views the document and the “Assign to PO” or “Assign to RFQ” options will automatically incorporate the updated information.

COMMERCE SMALL PURCHASES SYSTEM (CSPS)  
PROCUREMENT DESK PROCEDURES

STEP	ACTION	
	IF...	THEN...
2.	The requisitioner amends the requisition after the buyer clicks "Assign to RFQ" but before the buyer issues the RFQ ...	<p>The CHANGED REQUISITION field will be checked and action will be required by the buyer.</p> <p>The buyer should first view the changes using the "FM-030/014" icon in the toolbar (i.e., the "chess piece"). If the buyer determines that the requisition should still be competed via this process, the buyer should click the "APPLY CHANGES" button. This button will update the existing RFQ with the new requisition information (if applicable). If the buyer determines that the requisition should not be competed via this process, the buyer should cancel the RFQ and click the "APPLY CHANGES" button if the CHANGED REQUISITION field remains checked.</p>



COMMERCE SMALL PURCHASES SYSTEM (CSPS)  
PROCUREMENT DESK PROCEDURES

STEP	ACTION	
3.	The requisitioner modifies the requisition after the buyer issues the RFQ but before the buyer flags a vendor for award ...	<p>The <b>CHANGED REQUISITION</b> field will be checked and action will be required by the buyer.</p> <p>The buyer should first view the changes using the “FM-030/014” icon in the toolbar (i.e., the “chess piece”). If the buyer determines that the requisition should still be competed via this process, the buyer should click the “APPLY CHANGES” button. This button will <u>cancel</u> the existing RFQ and allow the buyer to automatically create a new RFQ based on the new requisition information (if applicable). If the buyer determines that the requisition should not be competed via this process, the buyer should still click the “APPLY CHANGES” button to cancel the existing RFQ and then choose <u>not</u> to have the system automatically create a new RFQ based on the new requisition information.</p>